U.S. FIDUCIARY INCOME TAX RETU FORM 1962 (FOR ESTATES AND TRUSTS) FOR CALENDAR YEAR U.S. Treasury Department Internal Revenue Service PLEASE TYPE OR PRINT PLAINLY Employer Identification Number of Estate or Trust Name of estate or trust Check whether: Estate Simple trust Complex trust Name, address, and title of fiduciary If Trust, check whether:] Testamentary Inter Vivos They need complete only the Simple trusts are not required to fill in the schedules on page 4. lines and schedules on pages 1, 2, and 3 that apply to them. See page 2 of instructions. Line and INCOME 1. Dividends (enter full amount before exclusion)..... 2. Interest on bank deposits, notes, corporation bonds, etc..... 3. Interest on tax-free covenant bonds upon which a Federal income tax was paid at source. 4. Interest on Government obligations, etc.... 5. Income from partnerships and other fiduciaries (instruction 5) Name and address ______ 6. Gross rents and royalties. 7. Gross profit (or loss) from trade or business. 8. (a) Net gain (or loss) from sale or exchange of capital assets (from line 10, Schedule D)... (b) Net gain (or loss) from sale or exchange of property other than capital assets (from line 19. Schedule D)..... 9. Other income (state nature of income) 10. 11. Interest (Schedule A). 12. Taxes (Schedule A)..... 13. Fiduciary's portion of depreciation (Schedule B) and depletion. Explain depletion..... 14. Charitable deduction (line 9, Schedule F).... 15. Other deductions authorized by law (Schedule A)..... Total (lines 11 to 15, inclusive) 18. Deduction for distributions to beneficiaries (instruction 18)..... 20. Federal estate tax attributable to income in respect of a decedent (Fiduciary's share)..... 21. Long-term capital gain deduction. Enter 50% of line 11(e), Schedule D...... 22. Exemption (instruction 22)..... Total (lines 18 to 22, inclusive)..... 23. COMPUTATION OF TAX 25. Tax on amount on line 24 (see tax rate schedule in instruction 25)...... 27. Fiduciary's share of foreign tax credit (Form 1116)..... 28. Fiduciary's share of credit for tax paid at source on tax-free covenant bond interest..... 29. Fiduciary's share of dividends received credit (line 7, Schedule E)..... 30. Fiduciary's share of credit for partially tax-exempt interest..... 31. Credit for tax deemed paid on undistributed capital gains of regulated investment companies. _____ **32.** Tax previously paid, or withheld (see instruction 32 and attach explanation) 33. Fiduciary's share of investment credit (see instruction 35 and attach Form 3468)...... 34 35. Balance of tax or overpayment (subtract line 34 from line 25 or line 26, whichever is applicable)..... SIGNATURE AND VERIFICATION (see general instruction E) I declare under penalties of perjury that I have examined this return (including accompanying schedules and statements) and to the best of my knowledge and belief it is true, correct, and complete. If prepared by a person other than taxpayer, his declaration is based on all information of which he has any knowledge. (Date) (Signature of fiduciary or officer representing fiduciary) (Address) (Date) (Signature of preparer other than fiduciary)

	Schedule A.—EXPL	ANATION OF DED	UCTIONS	S CLAIMED	ON LINE	ES 11, 12, and	d 15, PAGE I	(see inst	ruction 33)	
Line N	o. Explar	nation	Amo	unt I	Line No.	Ex	planation		Amount	
	Schedule	B.—EXPLANATIO	ON OF D	EDUCTION	FOR DE	PRECIATION	(see instruct	ion 34)		
This so well a headin vestme	chedule is designed for s for those taxpayers v ag for the new procedu nt credit by 7 percent of	taxpayers using the who wish to continue are and the second l of the gualified inves	e new guid e using pr heading fo tment. (3	delines and a eviously auth or the older p B percent for	dministrati norized pro rocedure. public utili	ve procedures ocedures. Wh Reduce the b Ities.)	described in Re tere double hed asis of property	evenue Pr adings ap which g	rocedure 62–21 as opear use the firs ualifies for the in	
1. Group and guideline class OR Description of property		2 Cost or other hasis	3 Accet	additions amount) 4. A	Asset retiremen year (amount) oplicable only to ev. Proc. 62-21)	ts 5. Deprecia	tion 6. Method	7. Class life - — OR — — Rate (%)		
									-	
			-							
 Less Bal Fidu 	alss: Amount of depreciation ance (line 1 less line 2 uciary's portion of line 1	ion claimed elsewhe 2)	re in this : on line 13	return 3, page 1						
	ount of additional first- t or other basis of fully	-								
	chedule C.—BENEFI		•					ts, see ir	nstruction 35)	
	1. Name of each beneficiary (Des	signate nonresident aliens, if	any)	2. Address (W	Where return of district,	beneficiary is filed in specify district, if kn	another internal reve	enue 3	. Social security number (See instructions)	
(b)										
			Conti	inuation of	Schedule	C				
	4. Amount of income required be distributed currently	5. Other amounts pai otherwise required tributed	r amounts paid, credited, or wise required to be dis- tributed		6. Domestic dividends qualifying for credit		7. Partially tax-exempt interest included in amount on line 4, page 1		8. Income taxable to beneficiaries less portion recortable in cols. 6, 7, 9, 10, and 11	
(a) (b) (c) (d) Totals										
			Conti	inuation of	Schedule ¹	C				
	9. Net short-term capital gain	10. Net long-term capital gain (100%)	foreign in	cempt income, and come of a foreign enter total only)	source (29	income tax paid at % of line 3, page 1, ne 28, page 1)	13. Income and pro paid to a foreign co United States pos	ountry or	14. Depreciation and depletion	
(a) (b) (c)			-							
(d) Totals		d- W. (
rotais	<u> </u>	ADI	OITIONAL	INFORMA	TION RE	QUIRED	<u> </u>			
	s a Form 1041 filed for lo ch District Director's off			00, 10	=	_	income, have y		eted only that por-	
2. Date	e trust was created or, if	an estate, date of de		eath!	5. If return	is for a trust,	enter name and	d address	s of grantor:	
Ger	opy of will or trust instruction "H" heral Instruction "H" heral date and place where	ument and statemen nas been filed do no	t required		been file	is for an esta ed?	□ No.		Estate Tax Returr	
				·!	7. Has fin □ Yes	al distribution □ No. If an	of assets bee swer is "Yes,"	n made see instru	during the year?	

Schedule D.—GAINS AN	D LOSSES FF		OR EXCHANG AL ASSETS	ES OF PROPE	RTY (see instructi	on 36)
Short-Terr	n Capital Gai		AL ASSETS Assets Held N	lot More Than	6 Months	
a. Kind of property (if necessary, attach state- ment of descriptive details not shown below)	b. Date acquired (mo., day, yr.)	c. Date sold (mo., day, yr.)	d. Gross sales price (contract price)	e. Depreciation allowed (or allowable) since acquisition or March 1, 1913 (attach schedule)	f. Cost or other basis, cost of subsequent im- provements (if not purchased, attach explanation) and expense of sale	g. Gain or loss (d plus e less f)
1.						
2. Enter your share of net short-term g	ain (or loss) froi	n partnerships	and other fiduci	aries		
3. Enter unused capital loss carryover 4. Net short-term gain (or loss) from lir	nes 1, 2, and 3.	Enter here a	nd on line 8 belo	w	<u> </u>	
Long-To	erm Capital G	ains and Los	ses—Assets Held	More Than 6	Months	
5						
	_					
6. Enter the full amount of your share	of net long-term	gain (or loss)	from partnership	os and other fidu	ıciaries	
7. Net long-term gain (or loss) from lin	es 5 and 6. E	nter here and	on line 9 below .	, , ,		
	C	APITAL GAI	INS AND LOSS		2. Fiduciary	3. Total
3. Net short-term gain or loss from line	1 abovo					
Net short-term gain or loss from lineNet long-term gain or loss from line	4, above 7 above					
10. Total net gain or loss						
	. 1	1 101	- 2 above If no	et loss on line 10), column 3, above, e	nter as loss on l
Enter on line 8(a), page 1, the net 8(a), page 1, whichever of the followicapital gains and losses and the dedu	ng is the smalle ction for person	est amount: (1) al exemption,	the amount of tr or (iii) \$1,000.	ie loss, (II) ta x al	oie income computed	i wiinoui regare
			Y'S CAPITAL			
11. (a) Long-term capital gain shown						
(b) Short-term capital loss shown	on line 9, colur on line 8, colum	nn 3. above nn 3. above				
(c) Excess of line 11(a) over line	ll(b), above					
(d) Long-term capital gains taxab	ole to beneficiar	ries. (Total of	column 10, Sche	edule C)		
(e) Balance (line 11(c) minus line						
If fiduciary had a net long-term capit line 10, above, and line 24, pac		wasas of not lo	F ALTERNATIV ng-term capital g y find it to his ad	rain over net sho	ort-term capital loss s e the alternative tax	hown in column computation.
12 Income from line 24 page 1						
13. 50% of amount on line 11(e), abo	ove					
14. Balance (line 12 minus line 13).						
15. Tax on amount on line 14 (see ta	x rate schedule	e in instructio	on 25)			
16. 50% of amount on line 13, above 17. Alternative tax (line 15 plus line	16), if less than	lino 25 page	1 enter this amo	ount on line 26.	page 1	
17. Alternative tax (line 13 plus line			R THAN CAPIT			
				e. Depreciation	f. Cost or other basis,	
Kind of property (if necessary, attach state- ment of descriptive details not shown below)	b. Date acquired (mo., day, yr.)	c. Date sold (mo., day, yr.)	d. Gross sales price (contract price)	allowed (or allowable) since acquisition or March 1, 1913 (attach schedule)	cost of subsequent improvements (if not purchased, attach explanation) and	g. Gain or loss (d plus e less f)
	_					
18.						
19. Net gain (or loss). Enter here an Schedule E.	FIDUCIARY	''S SHARE C	F DIVIDEND	CREDIT (see in	nstruction 37)	
1 Total domestic corporation dividen	ds aualifyina ur	nder section 34	, before dividend	exclusion		
2. Beneficiaries' share of dividends fr	om column 6, S	chedule C				
3. Adjustment of dividend exclusion for	or 1962 (line 19	, page l)				
4. Total (line 2 plus line 3)						
5. Fiduciary's share of dividends sub 6. Enter: (a) 4% of line 5	ect to credit (lir	ie i minus iine				
(b) Tax shown on line 25 or	: 26, page 1, le	ss amount on l	ine 27, page l			
(c) 4% of line 24, page 1.						
7. Enter here and on line 29, page 1	, the smallest of	the amounts o	on lines 6(a), 6(b)	, and 6(c) above	e	

	Schedule F.—COMPUTATION OF CHARITABLE DEDUCTION (see instruction 38) (submit statement giving name and address of charitable organization)
ί.	Amounts paid or permanently set aside for charitable purposes from current year's income
	Tax-exempt interest and foreign income of a foreign trust allocable to charitable distribution. (Complete lines 3 and 4 below only if gain on line 9, column 2, Schedule D, exceeds loss on line 8, column 2, Schedule D) (a) Long-term capital gain included on line 1
	(b) Enter gain on line 9, column 2, Schedule D, minus loss on line 8, column 2, Schedule D
	(c) Enter gain on line 9, column 3, Schedule D, minus loss on line 8, column 3, Schedule D
	Enter 50% of the smallest of line 3(a), line 3(b), or line 3(c)
ŝ.	Enter sum of line 2 and line 4 Balance (line 1 minus line 5)
	Enter short-term capital gains and 50% of the long-term capital gains of the current taxable year allocable to corpus, paid or permanently set aside for charitable purposes.
	Amounts paid or permanently set aside for charitable purposes other than from income of the current year
) <u>.</u>	Total (line 6 plus lines 7 and 8). Enter here and on line 14, page 1
	Schedule G.—COMPUTATION OF DISTRIBUTABLE NET INCOME (see instruction 39)
}. }.	Enter amount from line 17, page 1 Add: (a) Tax-exempt interest (as adjusted). (b) Foreign income of a foreign trust (as adjusted). (c) Net gain shown on line 10, column 1, Schedule D. If net loss, enter zero. (d) Lines 4 and 7, Schedule F. (e) Short-term capital gain included on line 1, Schedule F. (f) If amount on line 8(a), page 1, is a loss, enter amount here. Total (line 1 through line 2(f)). If amount on line 8(a), page 1, is a gain, enter amount here. Distributable net income (line 3 minus line 4).
	Schedule H.—COMPUTATION OF DISTRIBUTIONS DEDUCTION (see instruction 40)
1. 1. 5.	Total of columns 4 and 5 of Schedule C. Enter the total of column 11, Schedule C. Balance (line 1 minus line 2). Enter distributable net income (line 5, Schedule G). Enter the total of lines 2(a) and 2(b) of Schedule G. Balance (line 4 minus line 5). Distributions deduction. (Enter here and on line 18, page 1, the lesser of line 3 or line 6 above).
	During the taxable year did you make an accumulation distribution as defined in Sec. 665(b)? See general instruction Q. Yes No. If "Yes," attach Schedule J (Form 1041).
	Lies No. It ies, didch Schedule J (Form 1041).